

Operational webinar series:

Submit Nursing Home Institutional Claims using Templates

After this Webinar, you can:

- **Create Institutional claim templates**
- **Build a batch of claims from templates**
- **Submit a batch of template claims**
- **Submit individual claims from a template**
- **Submit a claim secondary to commercial insurance**

Creating a Claim Template

- To use ProviderOne Direct Data Entry (DDE):
 - Log into ProviderOne (<https://www.waproviderone.org/>)
 - Use profile “EXT Provider Claims Submitter” or “EXT Provider Super User” or EXT Eligibility Checker/Claims Submitter
 - At your Provider Portal (homepage)
 - Scroll down to “Claims ”
 - Click on “Manage Templates”



Creating a Claim Template

■ Create the Institutional Template

- Providers that use the UB-04 Claim Form or 837I

Creating a Claim Template

- Here is an overview of the Create Claim Template Screen

Close Add

Create a Claim Template

Type of Claim: Institutional *

Claims Template List

Edit View Delete Save As/Copy Create Batch Create Batch All Auto Batch

Filter By : [] And [] [] Go

<input type="checkbox"/>	Template Name ▲ ▼	Type ▲ ▼	Last Updated By ▲ ▼	Last Updated Date ▲ ▼
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No Records Found !

<< Prev Viewing Page 1 Next >> Go Page Count SaveToXLS

- We will cover each action that can be done at this screen in the following slides
- Pick Type of Claim as “Institutional” and click on the Add button

Creating a Claim Template

- The DDE claim /template screen requires the minimum information
 - Template Name
 - Answer all the questions

The screenshot displays the 'Institutional Claim' form in the Provider^{ne} system. At the top, there are buttons for 'Close', 'Save Template', and 'Reset'. Below these, a note states: 'Note: asterisks (*) denote required fields.' The form is divided into several sections: 'Basic Claim Info' (with a sub-tab 'Other Claim Info'), 'Billing Instructions', 'PROVIDER INFORMATION', 'SUBSCRIBER/CLIENT INFORMATION', and 'CLAIM INFORMATION'. In the 'Basic Claim Info' section, the 'Template Name' field is highlighted with a red box. In the 'PROVIDER INFORMATION' section, the 'Billing Provider' sub-section contains a question: 'Is the Billing Provider also the Pay-To Provider?' with 'Yes' and 'No' radio buttons; this question is also highlighted with a red box. Other fields include 'Submitter ID' (2857403), 'Provider NPI', 'Taxonomy Code', 'Client ID', and 'Patient Account No.'. The form also includes expandable sections for 'Additional Subscriber/Client Information' and 'CLAIM DATA'.

- Or a provider can add as much information as they want

Creating a Claim Template

- First task is to name the template

* Template Name:

PROVIDER INFORMATION

Go to [Other Claim Info](#) to enter information for providers other than the Billing and Pay-To Providers.

BILLING PROVIDER

* Provider NPI: * Taxonomy Code:

? * Is the Billing Provider also the Pay-To Provider? ☒ Yes ☐ No

- All claims submissions require new identifiers
 - NPI and Taxonomy

SUBSCRIBER/CLIENT INFORMATION

SUBSCRIBER/CLIENT

* Client ID:

☐ Additional Subscriber/Client Information

* Org/Last Name:

* Date of Birth: * Gender:

- ProviderOne Client ID Number
 - Last Name
 - Along with Gender and Date of Birth

Creating a Claim Template

- Fill in the claim data
 - We are going to cover filling in most fields

CLAIM INFORMATION
Go to [Other Claim Info](#) to enter additional claim information not displayed on this page.

CLAIM DATA

Patient Account No.:

Medical Record Number:

* Type Of Facility:

* Bill Classification:

* Statement Dates: From: mm dd ccyy To: mm dd ccyy

Admission Date/Hour: mm dd ccyy - hh : mm

Admission Type:

Admission Source:

Discharge Hour: hh : mm

Discharge Status:

* Total Claim Charge: \$

Patient Est. Amount Due: \$

DRG Code:

- Enter your Patient Account Number

Creating a Claim Template

- Pick the Type of Facility from the drop down



A screenshot of a web form. On the left, there is a label 'Type Of Facility:' with a red asterisk. To its right is a dropdown menu. A red arrow points from the label to the dropdown. The dropdown is open, showing a list of options: '1-Hospital', '2-Skilled Nursing', '3-Home Health', '4-Christian Science (Hospital)', '5-Christian Science (Extended Care)', '6-Intermediate Care', '7-Clinic', and '8-Special Facility'. The dropdown has a blue arrow icon in the top right corner.

- A Nursing Home would choose “2-Skilled Nursing”

Creating a Claim Template

■ Pick the Bill Classification from the drop down options

Nursing Homes using the DDE feature of ProviderOne would choose the 1E option from the list. The type of bill is then displayed in ProviderOne to state staff as 211.

* Bill Classification:

- 1C-Rural Health
- 1E-Inpatient (Including Medicare Part A)
- 1S-Hospice (Non-Hospital Based)
- 2C-Hospital Based or Independent Renal Dialysis Center
- 2E-Inpatient (Medicare Part B Only)
- 2S-Hospice (Hospital Based)
- 3C-Free Standing
- 3E-Outpatient
- 3S-Ambulatory Surgery Center
- 4C-Outpatient Rehabilitation Facility (ORF)
- 4E-Other
- 4S-Free Standing Birthing Center
- 5C-Comprehensive Outpatient Rehabilitation Facility (CORF)
- 5E-Intermediate Care - Level I
- 5S-Reserved for National Use
- 6C-Reserved for National Use
- 6E-Intermediate Care - Level II
- 6S-Reserved for National Use
- 7C-Federally qualified health center
- 7E-Intermediate Care - Level III
- 7S-Reserved for National Use
- 8C-Reserved for National Use
- 8E-Swing Beds
- 8S-Reserved for National Use
- 9C-Other
- 9E-Reserved for National Use
- 9S-Other

Creating a Claim Template

- On this template we will not be indicating the Statement Dates (dates of service)

CLAIM INFORMATION
Go to Other Claim Info to enter additional claim information not displayed on this page.

CLAIM DATA

Patient Account No.:

Medical Record Number:

* Type Of Facility:

* Bill Classification:

* Statement Dates: From: To:

- We will add an Admission Date

* Statement Dates: From: To:

Admission Date/Hour: - :

- :

Creating a Claim Template

■ Now we indicate the Admission Type

Admission Type:	<div><div>▼</div><div>1-Emergency 2-Urgent 3-Elective 4-Newborn 5-Trauma Center 9-Information Not Available</div></div>
-----------------	--

■ And then an Admission Source

Admission Source:	<div><div>▼</div><div>1-Non-Health Care Facility Point of Origin 2-Clinic 4-Transfer from a Hospital (Different Facility) 5-Trf frm a SNF or Intermediate Care Facility (ICF) 6-Transfer from Another Health Care Facility 7-Emergency room 8-Court/Law enforcement 9-Information Not Available B-Transfer From Another Home Health Agency C-Rdmission to same hm hlt agcy D-Trf frm One DU of Hsp to anthr DU on the Same Hsp E-Transfer from Ambulatory Surgery Center F-Trf frm Hsp Under Hspc Pln/Enrld in Hspc Prgm</div></div>
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Creating a Claim Template

■ Indicate the Patient Discharge Status

Discharge Status:

01-Dschrgd to hm/slf or (rtn)
02-Dschrgd/trf to short-term gnrl hsp for inptnt care
03-Dschrg/trf to SNF w/Mdcr Cert in Antoptn of Skl Cr
04-Dschrgd/trnsfrd to ICF
05-Dschrg/trf to Dsgntd Cancer Cntr or Children's Hsp
06-Dschrg/trf to Hm under Cr of orgzd Hm hlth srv org
07-Lft agst mdcl advc or dsont or
09-Admtd as IP to this hsptl
10-Reserved
11-Reserved
12-Reserved
13-Reserved
14-Reserved
15-Reserved
16-Reserved
17-Reserved
18-Reserved
19-Reserved
20-Expired
21-Reserved
22-Reserved
23-Reserved
24-Reserved
25-Reserved
26-Reserved
27-Reserved
28-Reserved
29-Reserved
30- Still Patient

Creating a Claim Template

■ Claim data filled in so far

CLAIM INFORMATION
Go to Other Claim Info to enter additional claim information not displayed on this page.

CLAIM DATA

Patient Account No.: SM4556

Medical Record Number:


* Type Of Facility: 2-Skilled Nursing ▼

* Bill Classification: 1E-Inpatient (Including Medicare Part A) ▼


* Statement Dates: From: mm dd ccyy To: mm dd ccyy

Admission Date/Hour: mm dd ccyy - hh : mm
04 01 2009 - 08 : 00

Admission Type: 3-Elective ▼

Admission Source: 4-Transfer from a Hospital (Different Facility) ▼ 

Discharge Hour: hh : mm

Discharge Status: 30- Still Patient ▼ 

* Total Claim Charge: \$ 5784.00


Patient Est. Amount Due: \$

DRG Code:

■ Then indicate the total charges

■ Now drop down and answer the Medicare question

Creating a Claim Template


- Scroll down the page, click on the  expander to open the value code information fields
 - Enter Value Code 24
 - Then enter the appropriate class code

<input type="checkbox"/> VALUE INFORMATION		
1	* Value Code: <input type="text" value="24"/>	* Value Amount: \$ <input type="text" value="20"/>
2	Value Code: <input type="text"/>	Value Amount: \$ <input type="text"/>
		Add Another
		DeleteRow1

- Enter the client participation as the second Value information
 - Enter Value Code 31
 - Enter the patient participation amount (Even if it is \$0)

<input type="checkbox"/> VALUE INFORMATION		
1	* Value Code: <input type="text" value="24"/>	* Value Amount: \$ <input type="text" value="20"/>
2	Value Code: <input type="text" value="31"/>	Value Amount: \$ <input type="text" value="570.50"/>
		Add Another
		DeleteRow1

Creating a Claim Template

- Next click on the diagnosis information  expander
 - Enter the Principal Diagnosis
 - Admitting Diagnosis
 - Other Diagnosis as necessary
 - Do not enter the decimal in the these fields

☐ **DIAGNOSIS INFORMATION**

* Principal Diagnosis Code:

Admitting Diagnosis Code:

E-Code:

☐ **Other Diagnosis Information**

1 * Other Diagnosis Code: [Add Another](#)

(Do not use decimals or spaces)

Creating a Claim Template

■ We now enter the service line data

SERVICE LINE ITEM INFORMATION			
Click on the Other Svc Info link associated with each added Service Line Item to enter line item information other than that			
Service Line Items			
* Revenue Code:	<input type="text" value="0190"/>	Rate Amount:	\$ <input type="text" value="192.80"/>
Procedure Code:	<input type="text"/>	Modifiers:	1: <input type="text"/> 2: <input type="text"/>
Service Date/First Date of Service:	<input type="text" value="mm"/> <input type="text" value="dd"/> <input type="text" value="ccyy"/>		
Last Date of Service:	<input type="text" value="mm"/> <input type="text" value="dd"/> <input type="text" value="ccyy"/>		
* Service Units:	<input type="text" value="30"/>		
* Total Line Charges: \$	<input type="text" value="5784"/>	Non-covered Line Charges: \$	<input type="text"/>
National Drug Code:	<input type="text"/>		

■ Enter Room Revenue Code 0190

- Enter monetary information so that the system will batch templates correctly
 - Enter your daily room Rate Amount
 - Enter the number of days as Service Units
 - Enter the Total Line Charge

Creating a Claim Template


- After entering all the service line data click on the **Add Service Line Item** button to add the data to your template claim

* Total Line Charges: \$ Non-covered Line Charges: \$

National Drug Code:

☐ Drug Identification

☐ Additional Service Line Information



Previously Entered Line Item Information

Click a Line No. below to view/update that Line Item Information.

Line No	Rev. Code	Rate	Proc. Code	Modifiers				Service Dates		Units	Charges	Non-covered Charges	
				1	2	3	4	From	To				
1	0190	192.80								30	5784	0	Delete or Other Service Info

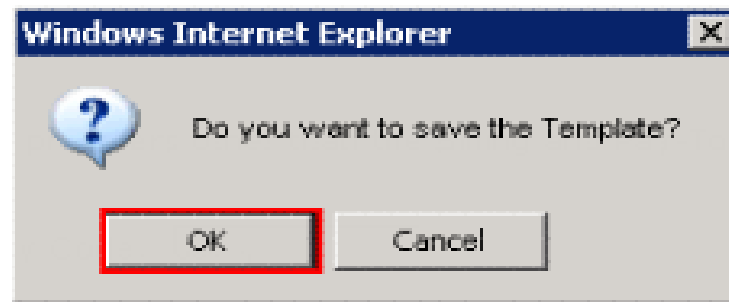
- The template is complete and ready to Save
 - Click the save template button

Institutional Claim:

Note: asterisks (*) denote required fields.

Creating a Claim Template

- ProviderOne now asks you verify saving the template. Click OK



- The first template is added to the list

Close Add

Create a Claim Template

Type of Claim: Institutional *

Claims Template List

Edit View Delete Save As/Copy Create Batch Create Batch All Auto Batch

Filter By : Template Type Institutional And Go

<input type="checkbox"/>	Template Name ▲ ▼	Type ▲ ▼	Last Updated By ▲ ▼	Last Updated Date ▲ ▼
<input type="checkbox"/>	Jane Doe	Institutional	GaryM	10/2/2010

<< Prev Viewing Page 1 Next >> Go Page Count Save To XLS

Creating a Claim Template

- Add as many templates as you need
 - Create new ones using the above method
 - Or copy the saved template then edit it

Close Add

Create a Claim Template

Type of Claim: Institutional *

Claims Template List

Edit View Delete Save As/Copy Create Batch Create Batch All Auto Batch

Filter By : Template Type Institutional And [] [] [] Go

<input type="checkbox"/>	Template Name	Type	Last Updated By	Last Updated Date
<input checked="" type="checkbox"/>	Jane Doe	Institutional	GaryM	10/2/2010

<< Prev Viewing Page 1 Next >> Go Page Count Save To XLS

- To copy a template click on the ☒ box
- Click on the Save As/Copy a Template button

Creating a Claim Template

- ProviderOne displays the template form
 - Clears the template name
 - Retains all the other template data

Close Save Template Reset

Institutional Claim:

Note: asterisks (*) denote required fields. Billing I

Basic Claim Info Other Claim Info

Billing Provider | Subscriber | Claim | Service

* Template Name:

PROVIDER INFORMATION

Go to [Other Claim Info](#) to enter information for providers other than the Billing and Pay-To Providers.

BILLING PROVIDER

* Provider NPI: * Taxonomy Code:

? * Is the Billing Provider also the Pay-To Provider? ☒ Yes ☐ No

SUBSCRIBER/CLIENT INFORMATION

SUBSCRIBER/CLIENT

* Client ID:

☐ **Additional Subscriber/Client Information**

* Org/Last Name:

* Date of Birth: * Gender:

- Add the new template name

Creating a Claim Template

■ Change client specific information

- Client ID, name, birth date, gender
- Admit date and other admission data
- Patient responsibility amount
- Diagnosis code

Close Save Template Reset

Institutional Claim:

Note: asterisks (*) denote required fields. Billing 1

BASIC CLAIM INFO Other Claim Info

Billing Provider | Subscriber | Claim | Service

* Template Name: []

PROVIDER INFORMATION

Go to Other Claim Info to enter information for providers other than the Billing and Pay-To Providers.

BILLING PROVIDER

* Provider NPI: [2549198465] * Taxonomy Code: [314000000X]

? * Is the Billing Provider also the Pay-To Provider? ☒ Yes ☐ No

SUBSCRIBER/CLIENT INFORMATION

SUBSCRIBER/CLIENT

* Client ID: []

☐ Additional Subscriber/Client Information

* Org/Last Name: []

* Date of Birth: [mm][dd][ccyy] * Gender: []

■ Save the new template

Creating a Claim Template

■ Create your list of template claims

Close Add

Create a Claim Template

Type of Claim: Institutional *

Claims Template List

Edit View Delete Save As/Copy Create Batch Create Batch All Auto Batch

Filter By : Template Type Institutional And Go

<input type="checkbox"/>	Template Name ▲ ▼	Type ▲ ▼	Last Updated By ▲ ▼	Last Updated Date ▲ ▼
<input type="checkbox"/>	John Smith	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Jane Doe	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Unde Sam	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Susan Madigan	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Lisa Fax	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Roberta Thomas	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Mickey Dee	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Ben Franklin	Institutional	GaryM	10/8/2010

<< Prev Viewing Page 1 Next >> Go Page Count SaveToXLS

■ Lets look at the other features of this screen now

Other Manage Template

- View a Template claim
 - Click on the ☒ box by the Template Name
 - Click on the view Template button

Close Add

Create a Claim Template

Type of Claim: Institutional *

Claims Template List

Edit View Delete Save As/Copy Create Batch Create Batch All Auto Batch

Filter: Template Type Institutional And Go

<input type="checkbox"/>	Template Name ▲ ▼	Type ▲ ▼	Last Updated By ▲ ▼	Last Updated Date ▲ ▼
<input type="checkbox"/>	John Smith	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Jane Doe	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Unde Sam	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Susan Madigan	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Lisa Fax	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Roberta Thomas	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Mickey Dee	Institutional	GaryM	10/2/2010
<input checked="" type="checkbox"/>	Ben Franklin	Institutional	GaryM	10/8/2010

<< Prev Viewing Page 1 Next >> Go Page Count Save To XLS

- View allows you to only see template data

Other Manage Template

- Delete a Template claim
 - Click on the ☒ box by the Template Name
 - Click on the Delete Template button

Close Add

Create a Claim Template

Type of Claim: Institutional *

Claims Template List

Edit View Delete Save As/Copy Create Batch Create Batch All Auto Batch

Filter By [dropdown] [input] And [dropdown] [input] [input] Go

<input type="checkbox"/>	Template Name	Type	Last Updated By	Last Updated Date
<input type="checkbox"/>	John Smith	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Jane Doe			10/2/2010
<input type="checkbox"/>	Unde Sam			10/2/2010
<input type="checkbox"/>	Susan Madigan			10/2/2010
<input type="checkbox"/>	Lisa Fax			10/2/2010
<input type="checkbox"/>	Roberta Thomas			10/2/2010
<input type="checkbox"/>	Mickey Dee	Institutional	GaryM	10/2/2010
<input checked="" type="checkbox"/>	Ben Franklin	Institutional	GaryM	10/8/2010

Windows Internet Explorer

Are you sure, Do you want to delete the selected Template?

OK Cancel

<< Prev Viewing Page 1 Next >> Go Page Count SaveToXLS

- Clicking the OK button deletes the template

Other Manage Template

- Edit a Template claim
 - Click on the ☒ box by the Template Name
 - Click on the Edit Template button

Close Add

Create a Claim Template

Type of Claim: Institutional *

Claims Template List

Edit View Delete Save As/Copy Create Batch Create Batch All Auto Batch

By : [] And [] Go

<input type="checkbox"/>	Template Name	Type	Last Updated By	Last Updated Date
<input type="checkbox"/>	John Smith	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Jane Doe	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Unde Sam	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Susan Madigan	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Lisa Fax	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Roberta Thomas	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Mickey Dee	Institutional	GaryM	10/2/2010
<input checked="" type="checkbox"/>	Ben Franklin	Institutional	GaryM	10/8/2010

<< Prev Viewing Page 1 Next >> Go Page Count SaveToXLS

- Edit as needed and save the template

■ Create a Batch of Template Claims

(No Trading Partner Agreement is required)

Batch Template Claims

- Create a batch of claims from your list of templates

Close Add

Create a Claim Template

Type of Claim: Institutional *

Claims Template List

Edit View Delete Save As/Copy **Create Batch** Create Batch All Auto Batch

Filter By: Template Type Institutional And Go

<input type="checkbox"/>	Template Name ▲ ▼	Type ▲ ▼	Last Updated By ▲ ▼	Last Updated Date ▲ ▼
<input type="checkbox"/>	John Smith	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Jane Doe	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Unde Sam	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Susan Madigan	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Lisa Fax	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Roberta Thomas	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Mickey Dee	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Ben Franklin	Institutional	GaryM	10/8/2010

<< Prev Viewing Page 1 Next >> Go Page Count SaveToXLS

Batch Template Claims

- Select the templates from the list to include in the batch

Close Add

Create a Claim Template

Type of Claim: Institutional *

Claims Template List

Edit View Delete Save As/Copy Create Batch Create Batch All Auto Batch

Filter By : [] And [] [] Go

<input type="checkbox"/>	Template Name ▲ ▼	Type ▲ ▼	Last Updated By ▲ ▼	Last Updated Date ▲ ▼
<input checked="" type="checkbox"/>	John Smith	Institutional	GaryM	10/2/2010
<input checked="" type="checkbox"/>	Jane Doe	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Uncle Sam	Institutional	GaryM	10/2/2010
<input checked="" type="checkbox"/>	Susan Madigan	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Lisa Fax	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Roberta Thomas	Institutional	GaryM	10/2/2010
<input checked="" type="checkbox"/>	Midkey Dee	Institutional	GaryM	10/2/2010
<input checked="" type="checkbox"/>	Ben Franklin	Institutional	GaryM	10/8/2010

<< Prev Viewing Page 1 Next >> Go Page Count Save To XLS

- Use the check box ☒ for each template

Batch Template Claims

- With the templates selected click on the Create Batch button

Close Add

Create a Claim Template

Type of Claim: Institutional *

Claims Template List

Edit View Delete Save As/Copy **Create Batch** Create Batch All Auto Batch

Filter By : [] And [] [] Go

<input type="checkbox"/>	Template name ▲ ▼	Type ▲ ▼	Last Updated By ▲ ▼	Last Updated Date ▲ ▼
<input checked="" type="checkbox"/>	John Smith	Institutional	GaryM	10/2/2010
<input checked="" type="checkbox"/>	Jane Doe	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Unde Sam	Institutional	GaryM	10/2/2010
<input checked="" type="checkbox"/>	Susan Madigan	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Lisa Fax	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Roberta Thomas	Institutional	GaryM	10/2/2010
<input checked="" type="checkbox"/>	Mickey Dee	Institutional	GaryM	10/2/2010
<input checked="" type="checkbox"/>	Ben Franklin	Institutional	GaryM	10/8/2010

<< Prev Viewing Page 1 Next >> Go Page Count Save To XLS

Batch Template Claims

- ProviderOne now displays the Batch Claim Attributes screen

Close Add

Create a Claim Template

Type of Claim: Institutional *

Claims Template List

Edit View Delete Save As/Copy

Filter By :

Batch Claim Attributes:

Claim Type: Institutional

From Date of Service: 10/01/2010

To Date of Service: 10/31/2010

Build Batch Cancel

	Updated Date
<input checked="" type="checkbox"/> John Smith	10/10/2010
<input checked="" type="checkbox"/> Jane Doe	10/10/2010
<input type="checkbox"/> Uncle Sam	10/10/2010
<input checked="" type="checkbox"/> Susan Madigan	10/10/2010
<input type="checkbox"/> Lisa Fax	10/10/2010
<input type="checkbox"/> Roberta Thomas	10/10/2010
<input checked="" type="checkbox"/> Mickey Dee	10/27/2010
<input checked="" type="checkbox"/> Ben Franklin	10/8/2010

<< Prev Viewing Page 1 Next >> Go Page Count SaveToXLS

- Add your From –To dates of service

Batch Template Claims

- Click on the **Build Batch** button

The screenshot shows a software interface for creating claim templates. A modal dialog box titled 'Batch Claim Attributes' is open, displaying the following information:

- Batch Number:** 500073991 (highlighted with a red box)
- Claim Type:** Institutional
- From Date of Service:** 10/01/2010
- To Date of Service:** 10/31/2010

At the bottom of the dialog, there are two buttons: 'Build Batch' and 'Cancel'. A red arrow points to the 'Build Batch' button.

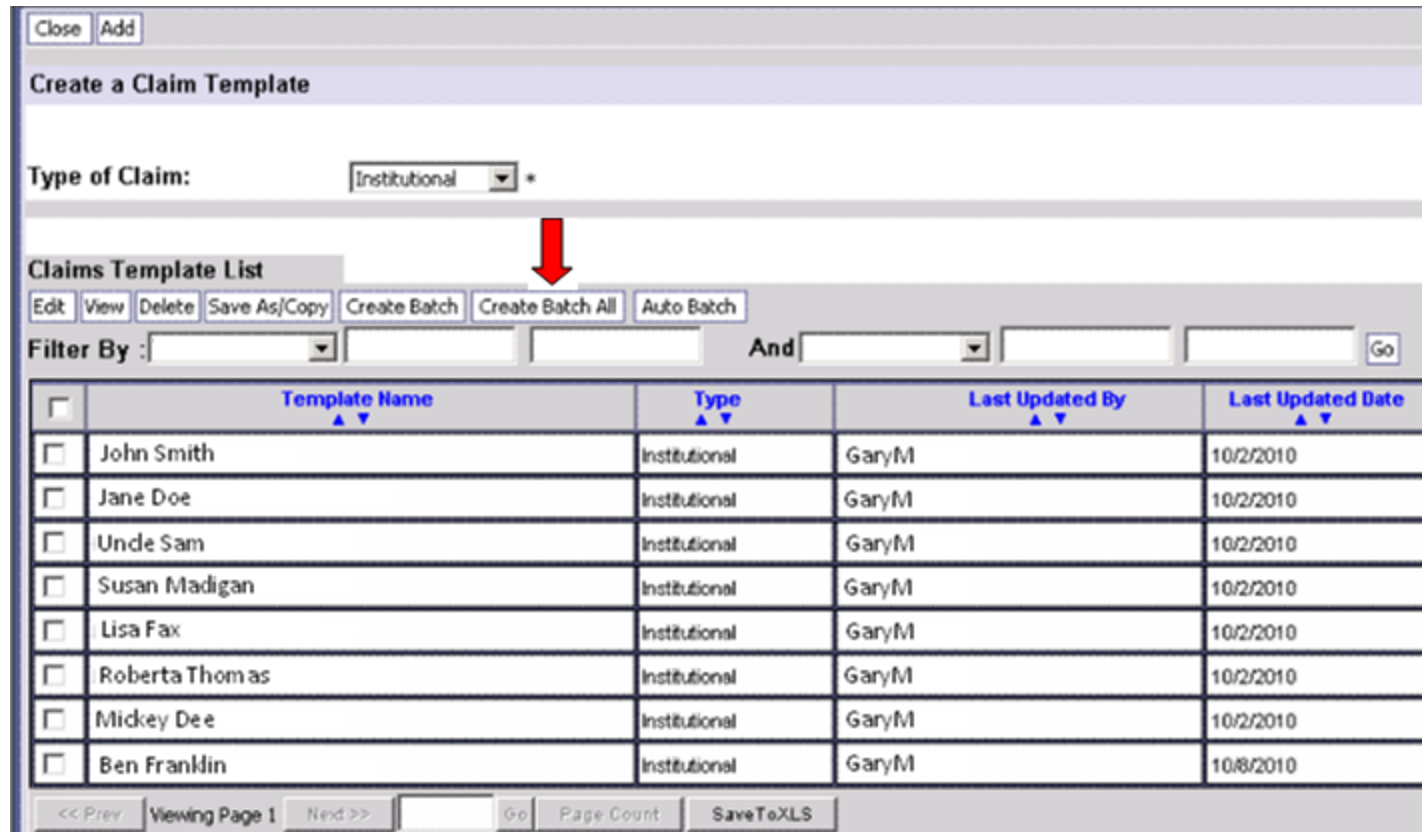
In the background, the 'Create a Claim Template' window is visible. It includes a 'Claims Template List' with a table of templates:

Filter By	Template Name	Updated Date
<input checked="" type="checkbox"/>	John Smith	10/10/2010
<input checked="" type="checkbox"/>	Jane Doe	10/10/2010
<input type="checkbox"/>	Uncle Sam	10/10/2010
<input checked="" type="checkbox"/>	Susan Madigan	10/10/2010
<input type="checkbox"/>	Lisa Fax	10/10/2010
<input type="checkbox"/>	Roberta Thomas	10/10/2010
<input checked="" type="checkbox"/>	Mickey Dee	10/27/2010
<input checked="" type="checkbox"/>	Ben Franklin	10/8/2010

- The system builds the batch and assigns a batch number
- Each template uses the date of service and adjusts the monetary amounts based on the date span

Batch all Template Claims

- Click on the **Create Batch All** button



The screenshot shows a web application interface for managing claim templates. At the top, there are 'Close' and 'Add' buttons. Below them is a section titled 'Create a Claim Template' with a 'Type of Claim:' dropdown menu set to 'Institutional'. The main section is 'Claims Template List', which contains a toolbar with buttons: 'Edit', 'View', 'Delete', 'Save As/Copy', 'Create Batch', 'Create Batch All' (highlighted with a red arrow), and 'Auto Batch'. Below the toolbar is a 'Filter By' section with dropdown menus and a 'Go' button. The table below lists several templates, all of which are 'Institutional' type and were updated by 'GaryM'.

<input type="checkbox"/>	Template Name ▲ ▼	Type ▲ ▼	Last Updated By ▲ ▼	Last Updated Date ▲ ▼
<input type="checkbox"/>	John Smith	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Jane Doe	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Unde Sam	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Susan Madigan	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Lisa Fax	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Roberta Thomas	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Mickey Dee	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Ben Franklin	Institutional	GaryM	10/8/2010

At the bottom of the interface, there are navigation controls: '<< Prev', 'Viewing Page 1', 'Next >>', a 'Go' button, 'Page Count', and a 'Save To XLS' button.

- To build a batch using all templates

Batch all Template Claims

- ProviderOne now displays the Batch Claim Attributes screen

Close Add

Create a Claim Template

Type of Claim: Institutional *

Claims Template List

Edit View Delete Save As/Copy Create Batch

Filter By :

Batch Claim Attributes:

Claim Type: Institutional

From Date of Service: 06/01/2010

To Date of Service: 06/30/2010

Build Batch Cancel

Template Name	Claim Type	Updated Date
John Smith		0
Jane Doe		0
Uncle Sam		0
Susan Madigan		0
Lisa Fax		0
Roberta Thomas	Institutional	10/2/2010
Mickey Dee	Institutional	10/2/2010
Ben Franklin	Institutional	10/8/2010

<< Prev Viewing Page 1 Next >> Go Page Count SaveToXLS

- Add your From –To dates of service

Batch all Template Claims

- Click on the **Build Batch** button

The screenshot shows a web application interface for creating claim templates. A modal dialog titled 'Batch Claim Attributes' is open, displaying the following fields:

- Batch Number is 500073996 (highlighted with a red box)
- Claim Type: Institutional (dropdown)
- From Date of Service: 06/01/2010
- To Date of Service: 06/30/2010
- Buttons: Build Batch (highlighted with a red arrow), Cancel

The background interface includes a 'Create a Claim Template' header, a 'Type of Claim' dropdown set to 'Institutional', and a 'Claims Template List' table. The table has columns for 'Template Name', 'Institutional', 'GaryM', and 'Updated Date'.

Template Name	Institutional	GaryM	Updated Date
<input type="checkbox"/> John Smith			0
<input type="checkbox"/> Jane Doe			0
<input type="checkbox"/> Uncle Sam			0
<input type="checkbox"/> Susan Madigan			0
<input type="checkbox"/> Lisa Fax			0
<input type="checkbox"/> Roberta Thomas	Institutional	GaryM	10/2/2010
<input type="checkbox"/> Mickey Dee	Institutional	GaryM	10/2/2010
<input type="checkbox"/> Ben Franklin	Institutional	GaryM	10/8/2010

- The system builds the batch and assigns a batch number

Auto Batch Template Claims

- If you click on the **Auto Batch** button you will get the following message

Close Add

Create a Claim Template

Type of Claim: Institutional *

Claims Template List

Edit View Delete Save As/Copy Create Batch Create Batch All Auto Batch

Filter By : [] And [] [] Go

<input type="checkbox"/>	Template Name	Type	Last Updated By	Last Updated Date
<input type="checkbox"/>	John Smith			10/2/2010
<input type="checkbox"/>	Jane Doe			10/2/2010
<input type="checkbox"/>	Uncle Sam			10/2/2010
<input type="checkbox"/>	Susan Madigan			10/2/2010
<input type="checkbox"/>	Lisa Fax	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Roberta Thomas	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Midkey Dee	Institutional	GaryM	10/2/2010
<input type="checkbox"/>	Ben Franklin	Institutional	GaryM	10/8/2010

<< Prev Viewing Page 1 Next >> [] Go Page Count Save To XLS

Windows Internet Explorer

! This functionality will be available in the near future.

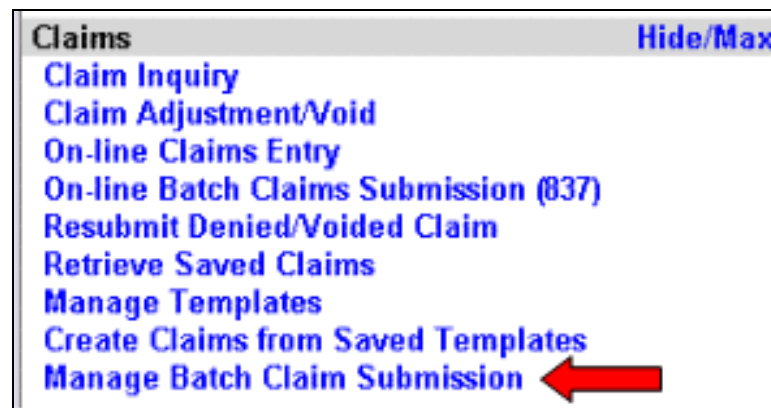
OK

- Auto Batch is a future system enhancement

Manage Batch Claim Submission

■ Manage Batch Claim Submission

- At your Provider Portal (homepage)
 - Scroll down to “Claims ”
 - Click on “Manage Batch Claim Submission”



Manage Batch Claim Submission

■ Manage Batch Claim Submission

Close View Claims Revalidate Delete

Batch Claim Submission Status List:

Filter By : Go

<input type="checkbox"/>	Batch Number ▲ ▼	Type ▲ ▼	Created By ▲ ▼	Batch Creation Date □ ▼	Status ▲ ▼	From Service Date ▲ ▼	To Service Date ▲ ▼	Total Billed Amount ▲ ▼	Claim Count ▲ ▼	Submitted Claim Count ▲ ▼
<input type="checkbox"/>	123456878	Institutional	GaryM	06/01/2010	Waiting	06/01/2010	06/30/2010	0	0	0
<input type="checkbox"/>	28365092	Institutional	GaryM	07/01/2010	In Process	07/01/2010	07/31/2010	0	8	0
<input type="checkbox"/>	33386073	Institutional	GaryM	08/01/2010	Failed in Validation	08/01/2010	08/31/2010	0	7	0
<input type="checkbox"/>	68001776	Institutional	GaryM	09/01/2010	Passed Validation	09/01/2010	09/30/2010	\$17,352.00	3	0
<input type="checkbox"/>	11187365	Institutional	GaryM	10/01/2010	Submitted for Claims Loading	10/01/2010	10/31/2010	\$468,504.00	81	65

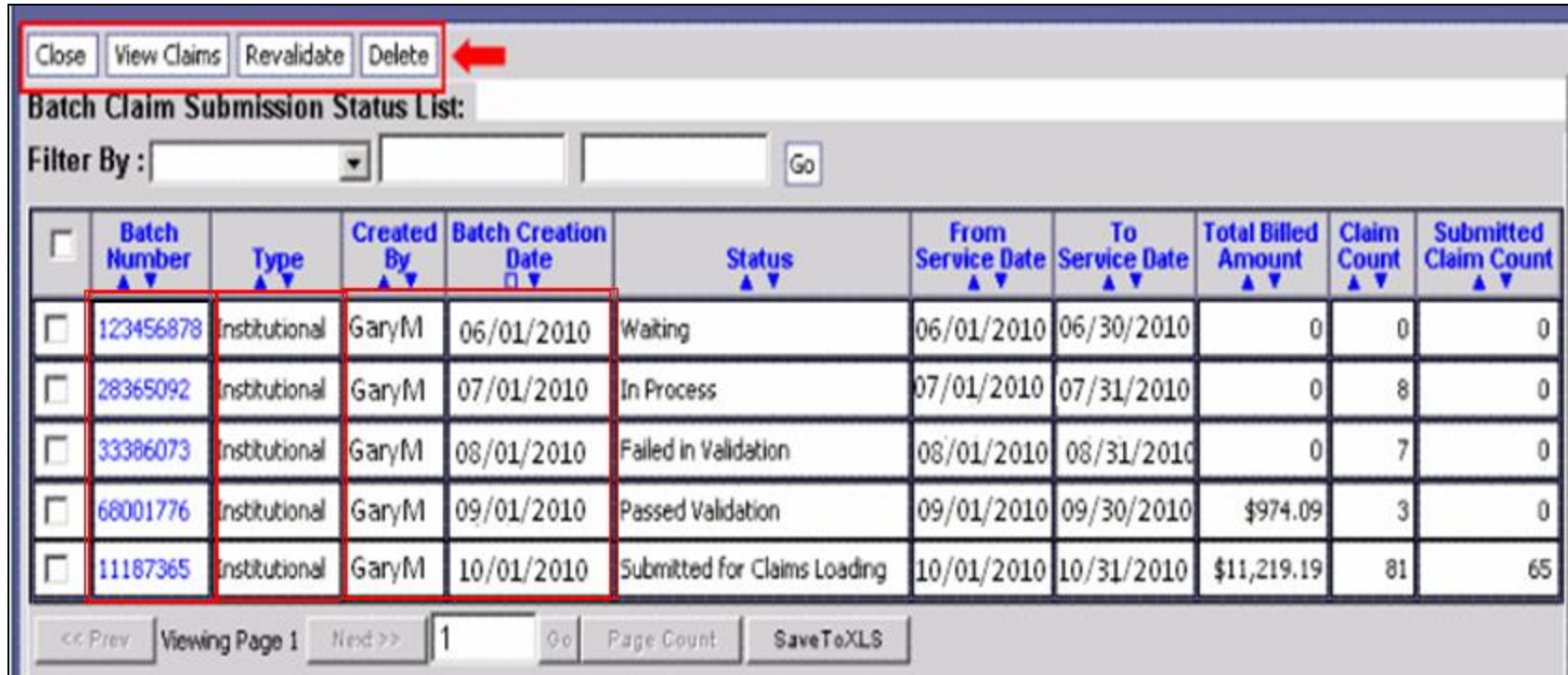
<< Prev Viewing Page 1 Next >> 1 Go Page Count SaveToXLS

■ Busy screen

■ Lets discuss important elements

Manage Batch Claim Submission

- Top buttons control batch activity



Close View Claims Revalidate Delete

Batch Claim Submission Status List:

Filter By : Go

<input type="checkbox"/>	Batch Number	Type	Created By	Batch Creation Date	Status	From Service Date	To Service Date	Total Billed Amount	Claim Count	Submitted Claim Count
<input type="checkbox"/>	123456878	Institutional	GaryM	06/01/2010	Waiting	06/01/2010	06/30/2010	0	0	0
<input type="checkbox"/>	28365092	Institutional	GaryM	07/01/2010	In Process	07/01/2010	07/31/2010	0	8	0
<input type="checkbox"/>	33386073	Institutional	GaryM	08/01/2010	Failed in Validation	08/01/2010	08/31/2010	0	7	0
<input type="checkbox"/>	68001776	Institutional	GaryM	09/01/2010	Passed Validation	09/01/2010	09/30/2010	\$974.09	3	0
<input type="checkbox"/>	11187365	Institutional	GaryM	10/01/2010	Submitted for Claims Loading	10/01/2010	10/31/2010	\$11,219.19	81	65

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- Batch Number assigned during building
- Type of Batch, creator and creation date

Manage Batch Claim Submission

- The list page displays the status of the batch

Close View Claims Revalidate Delete

Batch Claim Submission Status List:

Filter By : Go

<input type="checkbox"/>	Batch Number ▲ ▼	Type ▲ ▼	Created By ▲ ▼	Batch Creation Date □ ▼	Status ▲ ▼	From Service Date ▲ ▼	To Service Date ▲ ▼	Total Billed Amount ▲ ▼	Claim Count ▲ ▼	Submitted Claim Count ▲ ▼
<input type="checkbox"/>	123456878	Institutional	GaryM	06/01/2010	Waiting	06/01/2010	06/30/2010	0	0	0
<input type="checkbox"/>	28365092	Institutional	GaryM	07/01/2010	In Process	07/01/2010	07/31/2010	0	8	0
<input type="checkbox"/>	33386073	Institutional	GaryM	08/01/2010	Failed in Validation	08/01/2010	08/31/2010	0	7	0
<input type="checkbox"/>	68001776	Institutional	GaryM	09/01/2010	Passed Validation	09/01/2010	09/30/2010	\$974.09	3	0
<input type="checkbox"/>	11187365	Institutional	GaryM	10/01/2010	Submitted for Claims Loading	10/01/2010	10/31/2010	\$11,219.19	81	65

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- Lists the From-To dates of service
- And also gives totals of claims in the batch

Manage Batch Claim Submission

- Lets go into the Batch Status detail

Close View Claims Revalidate Delete

Batch Claim Submission Status List:

Filter By : Go

<input type="checkbox"/>	Batch Number ▲ ▼	Type ▲ ▼	Created By ▲ ▼	Batch Creation Date □ ▼	Status ▲ ▼	From Service Date ▲ ▼	To Service Date ▲ ▼	Total Billed Amount ▲ ▼	Claim Count ▲ ▼	Submitted Claim Count ▲ ▼
<input type="checkbox"/>	123456878	Institutional	GaryM	06/01/2010	Waiting	06/01/2010	06/30/2010	0	0	0
<input type="checkbox"/>	28365092	Institutional	GaryM	07/01/2010	In Process	07/01/2010	07/31/2010	0	8	0
<input type="checkbox"/>	33386073	Institutional	GaryM	08/01/2010	Failed in Validation	08/01/2010	08/31/2010	0	7	0
<input type="checkbox"/>	68001776	Institutional	GaryM	09/01/2010	Passed Validation	09/01/2010	09/30/2010	\$17,352.00	3	0
<input type="checkbox"/>	11187365	Institutional	GaryM	10/01/2010	Submitted for Claims Loading	10/01/2010	10/31/2010	\$468,504.00	81	65

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- Important actions to take with each type of batch status

Manage Batch Claim Submission

■ ■ Waiting (for validation)

Close View Claims Revalidate Delete

Batch Claim Submission Status List:

Filter By : Go

<input type="checkbox"/>	Batch Number ▲ ▼	Type ▲ ▼	Created By ▲ ▼	Batch Creation Date □ ▼	Status ▲ ▼	From Service Date ▲ ▼	To Service Date ▲ ▼	Total Billed Amount ▲ ▼	Claim Count ▲ ▼	Submitted Claim Count ▲ ▼
<input type="checkbox"/>	123456878	Institutional	GaryM	06/01/2010	Waiting	06/01/2010	06/30/2010	0	0	0
<input type="checkbox"/>	28365092	Institutional	GaryM	07/01/2010	In Process	07/01/2010	07/31/2010	0	8	0
<input type="checkbox"/>	33386073	Institutional	GaryM	08/01/2010	Failed in Validation	08/01/2010	08/31/2010	0	7	0
<input type="checkbox"/>	68001776	Institutional	GaryM	09/01/2010	Passed Validation	09/01/2010	09/30/2010	\$17,352.00	3	0
<input type="checkbox"/>	11187365	Institutional	GaryM	10/01/2010	Submitted for Claims Loading	10/01/2010	10/31/2010	\$468,504.00	81	65

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- ■ The batch of templates has been submitted
- ■ The system moves the templates to the process que on the next cycle

Manage Batch Claim Submission

■ In Process

Close

View Claims

Revalidate

Delete

Batch Claim Submission Status List:

Filter By :

Go

<input type="checkbox"/>	Batch Number ▲▼	Type ▲▼	Created By ▲▼	Batch Creation Date □▼	Status ▲▼	From Service Date ▲▼	To Service Date ▲▼	Total Billed Amount ▲▼	Claim Count ▲▼	Submitted Claim Count ▲▼
<input type="checkbox"/>	123456878	Institutional	GaryM	06/01/2010	Waiting	06/01/2010	06/30/2010	0	0	0
<input type="checkbox"/>	28365092	Institutional	GaryM	07/01/2010	In Process	07/01/2010	07/31/2010	0	8	0
<input type="checkbox"/>	33386073	Institutional	GaryM	08/01/2010	Failed in Validation	08/01/2010	08/31/2010	0	7	0
<input type="checkbox"/>	68001776	Institutional	GaryM	09/01/2010	Passed Validation	09/01/2010	09/30/2010	\$17,352.00	3	0
<input type="checkbox"/>	11187365	Institutional	GaryM	10/01/2010	Submitted for Claims Loading	10/01/2010	10/31/2010	\$468,504.00	81	65

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Go

Page Count

SaveToXLS

- The batch of templates has been submitted
- The system is picking up the templates to validate

Manage Batch Claim Submission

Failed in Validation

Close

View Claims

Revalidate

Delete

Batch Claim Submission Status List:

Filter By :

Go

<input type="checkbox"/>	Batch Number ▲▼	Type ▲▼	Created By ▲▼	Batch Creation Date □▼	Status ▲▼	From Service Date ▲▼	To Service Date ▲▼	Total Billed Amount ▲▼	Claim Count ▲▼	Submitted Claim Count ▲▼
<input type="checkbox"/>	123456878	Institutional	GaryM	06/01/2010	Waiting	06/01/2010	06/30/2010	0	0	0
<input type="checkbox"/>	28365092	Institutional	GaryM	07/01/2010	In Process	07/01/2010	07/31/2010	0	8	0
<input type="checkbox"/>	33386073	Institutional	GaryM	08/01/2010	Failed in Validation	08/01/2010	08/31/2010	0	7	0
<input type="checkbox"/>	68001776	Institutional	GaryM	09/01/2010	Passed Validation	09/01/2010	09/30/2010	\$17,352.00	3	0
<input type="checkbox"/>	11187365	Institutional	GaryM	10/01/2010	Submitted for Claims Loading	10/01/2010	10/31/2010	\$468,504.00	81	65

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SaveToXLS

- The batch of templates has been submitted
- One or more of the templates did not pass validation

Manage Batch Claim Submission

■ Passed Validation

Close View Claims Revalidate Delete

Batch Claim Submission Status List:

Filter By : Go

<input type="checkbox"/>	Batch Number ▲▼	Type ▲▼	Created By ▲▼	Batch Creation Date □▼	Status ▲▼	From Service Date ▲▼	To Service Date ▲▼	Total Billed Amount ▲▼	Claim Count ▲▼	Submitted Claim Count ▲▼
<input type="checkbox"/>	123456878	Institutional	GaryM	06/01/2010	Waiting	06/01/2010	06/30/2010	0	0	0
<input type="checkbox"/>	28365092	Institutional	GaryM	07/01/2010	In Process	07/01/2010	07/31/2010	0	8	0
<input type="checkbox"/>	33386073	Institutional	GaryM	08/01/2010	Failed in Validation	08/01/2010	08/31/2010	0	7	0
<input type="checkbox"/>	68001776	Institutional	GaryM	09/01/2010	Passed Validation	09/01/2010	09/30/2010	\$17,352.00	3	0
<input type="checkbox"/>	11187365	Institutional	GaryM	10/01/2010	Submitted for Claims Loading	10/01/2010	10/31/2010	\$468,504.00	81	65

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- The batch of templates has been submitted
- All the templates in the batch passed validation

Manage Batch Claim Submission

■ Submitted for Claims Loading

<input type="button" value="Close"/> <input type="button" value="View Claims"/> <input type="button" value="Revalidate"/> <input type="button" value="Delete"/>										
Batch Claim Submission Status List:										
Filter By : <input type="text"/> <input type="text"/> <input type="button" value="Go"/>										
<input type="checkbox"/>	Batch Number ▲▼	Type ▲▼	Created By ▲▼	Batch Creation Date □▼	Status ▲▼	From Service Date ▲▼	To Service Date ▲▼	Total Billed Amount ▲▼	Claim Count ▲▼	Submitted Claim Count ▲▼
<input type="checkbox"/>	123456878	Institutional	GaryM	06/01/2010	Waiting	06/01/2010	06/30/2010	0	0	0
<input type="checkbox"/>	28365092	Institutional	GaryM	07/01/2010	In Process	07/01/2010	07/31/2010	0	8	0
<input type="checkbox"/>	33386073	Institutional	GaryM	08/01/2010	Failed in Validation	08/01/2010	08/31/2010	0	7	0
<input type="checkbox"/>	68001776	Institutional	GaryM	09/01/2010	Passed Validation	09/01/2010	09/30/2010	\$17,352.00	3	0
<input type="checkbox"/>	11187365	Institutional	GaryM	10/01/2010	Submitted for Claims Loading	10/01/2010	10/31/2010	\$468,504.00	81	65
<input type="button" value="Prev"/> Viewing Page 1 <input type="button" value="Next"/> <input type="text" value="1"/> <input type="button" value="Go"/> Page Count: <input type="button" value="SaveToXLS"/>										

■ The batch of templates have been submitted

■ No longer templates now claims

- Batch claim data now displayed (\$\$, claim count)
- System now generates the claim TCN

Manage Batch Claim Submission

- ■ How to submit a batch of Templates to Claim Submission

Manage Batch Claim Submission

■ Submit a batch of Templates

Close **View Claims** Revalidate Delete

Batch Claim Submission Status List:

Filter By : Go

<input type="checkbox"/>	Batch Number ▲▼	Type ▲▼	Created By ▲▼	Batch Creation Date □▼	Status ▲▼	From Service Date ▲▼	To Service Date ▲▼	Total Billed Amount ▲▼	Claim Count ▲▼	Submitted Claim Count ▲▼
<input type="checkbox"/>	123456878	Institutional	GaryM	06/01/2010	Waiting	06/01/2010	06/30/2010	0	0	0
<input type="checkbox"/>	28365092	Institutional	GaryM	07/01/2010	In Process	07/01/2010	07/31/2010	0	8	0
<input type="checkbox"/>	33386073	Institutional	GaryM	08/01/2010	Failed in Validation	08/01/2010	08/31/2010	0	7	0
<input type="checkbox"/>	68001776	Institutional	GaryM	09/01/2010	Passed Validation	09/01/2010	09/30/2010	\$17,352.00	3	0
<input checked="" type="checkbox"/>	11187365	Institutional	GaryM	10/01/2010	Passed Validation	10/01/2010	10/31/2010	\$468,504.00	81	0

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■ Must have passed Validation

- Check on ☒ the batch line you want to submit
- Then click on the **View Claims** button on the top

Manage Batch Claim Submission

■ How to submit a batch that passed validation

Close **Submit Batch** **Submit All** Delete

Claims Created From Batch List:

Filter By : And Go

<input type="checkbox"/>	Link ▾ ▾	System Generated Claim ID ▲ ▾	Template Name ▲ ▾	Client Id ▲ ▾	Patient Responsibility ▲ ▾	From Service Date ▲ ▾	To Service Date ▲ ▾	Patient Class Code ▲ ▾	Client Last Name ▲ ▾
<input type="checkbox"/>	▶	123456789-0001	John Smith	999999998WA	0	06/01/2010	06/30/2010	20	John Smith
<input type="checkbox"/>	▶	234567890-0001	Jane Doe	999999998WA	0	06/01/2010	06/30/2010	20	Jane Doe
<input type="checkbox"/>	▶	345678901-0001	Unde Sam	999999998WA	0	06/01/2010	06/30/2010	20	Unde Sam
<input type="checkbox"/>	▶	456789012-0001	Susan Madigan	999999998WA	0	06/01/2010	06/30/2010	20	Susan Madigan
<input type="checkbox"/>	▶	567890123-0001	Lisa Fax	999999998WA	0	06/01/2010	06/30/2010	20	Lisa Fax
<input type="checkbox"/>	▶	678901234-0001	Roberta Thomas	999999998WA	0	06/01/2010	06/30/2010	20	Roberta Thomas
<input type="checkbox"/>	▶	789012345-0001	Midkey Dee	999999998WA	0	06/01/2010	06/30/2010	20	Midkey Dee

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■ There are two ways

- Check ☒ templates to include in this batch using the **Submit Batch** button or
- Use the **Submit All** button to submit all the templates

Manage Batch Claim Submission

- The batch of claims is now loading into ProviderOne

Close View Claims Revalidate Delete

Batch Claim Submission Status List:

Filter By : Go

<input type="checkbox"/>	Batch Number ▲▼	Type ▲▼	Created By ▲▼	Batch Creation Date □▼	Status ▲▼	From Service Date ▲▼	To Service Date ▲▼	Total Billed Amount ▲▼	Claim Count ▲▼	Submitted Claim Count ▲▼
<input type="checkbox"/>	123456878	Institutional	GaryM	06/01/2010	Waiting	06/01/2010	06/30/2010	0	0	0
<input type="checkbox"/>	28365092	Institutional	GaryM	07/01/2010	In Process	07/01/2010	07/31/2010	0	8	0
<input type="checkbox"/>	33386073	Institutional	GaryM	08/01/2010	Failed in Validation	08/01/2010	08/31/2010	0	7	0
<input type="checkbox"/>	68001776	Institutional	GaryM	09/01/2010	Passed Validation	09/01/2010	09/30/2010	\$17,352.00	3	0
<input type="checkbox"/>	11187365	Institutional	GaryM	10/01/2010	Submitted for Claims Loading	10/01/2010	10/31/2010	\$468,504.00	81	65

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- The claims have been assigned TCN numbers
- This batch will auto purge from the list when claims are loaded

Manage Batch Claim Submission

- ■ How do I fix a Template that failed Validation?

Manage Batch Claim Submission

Failed in Validation

Close View Claims Revalidate Delete

Batch Claim Submission Status List:

Filter By : Go

<input type="checkbox"/>	Batch Number ▲▼	Type ▲▼	Created By ▲▼	Batch Creation Date □▼	Status ▲▼	From Service Date ▲▼	To Service Date ▲▼	Total Billed Amount ▲▼	Claim Count ▲▼	Submitted Claim Count ▲▼
<input type="checkbox"/>	123456878	Institutional	GaryM	06/01/2010	Waiting	06/01/2010	06/30/2010	0	0	0
<input type="checkbox"/>	28365092	Institutional	GaryM	07/01/2010	In Process	07/01/2010	07/31/2010	0	8	0
<input type="checkbox"/>	33386073	Institutional	GaryM	08/01/2010	Failed in Validation	08/01/2010	08/31/2010	0	7	0
<input type="checkbox"/>	68001776	Institutional	GaryM	09/01/2010	Passed Validation	09/01/2010	09/30/2010	\$17,352.00	3	0
<input type="checkbox"/>	11187365	Institutional	GaryM	10/01/2010	Submitted for Claims Loading	10/01/2010	10/31/2010	\$468,504.00	81	65

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Click on the batch number to view the templates

Manage Batch Claim Submission

- The list of templates is displayed

Close Revalidate

View Templates List from Batch:

Filter By : [] And [] Go

Template Name □ ▼	Status ▲ ▼	Claim Type ▲ ▼
John Smith	Invalid	Institutional
Jane Doe	Valid	Institutional
Uncle Sam	Valid	Institutional
Susan Madigan	Valid	Institutional
Lisa Fax	Valid	Institutional
Roberta Thomas	Valid	Institutional
Mickey Dee	Valid	Institutional

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- Click on “Invalid” to see the template error

Manage Batch Claim Submission

- ProviderOne displays the template error (s)

The screenshot shows a software window titled 'Template Validation Errors:'. On the left, there is a sidebar with a 'Filter By:' dropdown and a list of template names: John Smith, Jane Doe, Uncle Sam, Susan Madiga, Lisa Fax, Roberta Thor, and Mickey Dee. The main area displays the selected template's details: 'Template Name: Jane Doe' and 'Client ID: 999999998WA'. Below this, the 'Error Description:' field contains the text 'Billing Taxonomy - 207AQ0000X is invalid'. At the bottom right of the main area, there is a 'Cancel' button, which is highlighted by a red arrow. Other buttons visible include 'Close', 'Revalidate', 'View Template', 'Go', and '<< Prev'.

- Click on the cancel button once the errors are identified.

Manage Batch Claim Submission

- Click on the template name to fix the error(s)

Close Revalidate

View Templates List from Batch:

Filter By : [] [] [] And [] [] [] Go

Template Name ▼	Status ▲ ▼	Claim Type ▲ ▼
John Smith	Invalid	Institutional
Jane Doe	Valid	Institutional
Uncle Sam	Valid	Institutional
Susan Madigan	Valid	Institutional
Lisa Fax	Valid	Institutional
Roberta Thomas	Valid	Institutional
Mickey Dee	Valid	Institutional

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- ProviderOne now loads the DDE template form

Manage Batch Claim Submission

- When the DDE screen is loaded correct the error (s)

The screenshot shows a web-based form titled 'Institutional Claim'. At the top, there are buttons for 'Close', 'Save Template', and 'Reset'. Below the title, there is a note: 'Note: asterisks (*) denote required fields.' The form is divided into sections: 'Basic Claim Info' (selected) and 'Other Claim Info'. Under 'Basic Claim Info', there is a table with columns: 'Billing Provider', 'Subscriber', 'Claim', and 'Service'. To the right of the table is a 'Submitter ID' field. Below the table, there is a 'Template Name' field with the value 'Institutional Claim Template 1'. The 'PROVIDER INFORMATION' section is expanded, showing 'BILLING PROVIDER' details. The 'Provider NPI' field contains '5522336671'. There is a 'Taxon' field. Below this, there is a question: 'Is the Billing Provider also the Pay-To' with a 'Yes' radio button selected and a 'No' radio button. The 'SUBSCRIBER/CLIENT INFORMATION' section is also expanded, showing 'SUBSCRIBER/CLIENT' details. A 'Windows Internet Explorer' dialog box is overlaid on the form, asking 'Do you want to save the Template?' with 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red rectangle.

- Then click the **Save Template** button
- At the save template popup click OK

Manage Batch Claim Submission

- Click on the **Revalidate** button
- When the system refreshes click on the **Close** button

Close Revalidate

View Templates List from Batch:

Filter By: [] And [] [Go]

Template Name □ ▼	Status ▲ ▼	Claim Type ▲ ▼
John Smith	Invalid	Institutional
Jane Doe	Valid	Institutional
Uncle Sam	Valid	Institutional
Susan Madigan	Valid	Institutional
Lisa Fax	Valid	Institutional
Roberta Thomas	Valid	Institutional
Mickey Dee	Valid	Institutional

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- The system returns to the batch status list screen and this batch is now in “Waiting” status
- ProviderOne is validating the templates again

Submit a Template Claim

■ Submit a Single Claim from a Template

- At your Provider Portal (homepage)
 - Scroll down to “Claims ”
 - Click on “Create Claims from Saved Templates”



Submit a Template Claim

- Click on the Template name to create a claim

Close

Create Claim from Saved Templates List:

Filter By : And Go

Template Name ▲ ▼	Type ▲ ▼	Last Updated By ▲ ▼	Last Updated □ ▼
John Smith	Institutional	GaryM	10/2/2010
Jane Doe	Institutional	GaryM	10/2/2010
Uncle Sam	Institutional	GaryM	10/2/2010
Susan Madigan	Institutional	GaryM	10/2/2010
Lisa Fax	Institutional	GaryM	10/2/2010
Roberta Thomas	Institutional	GaryM	10/2/2010
Mickey Dee	Institutional	GaryM	10/2/2010

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- ProviderOne loads the template data in the DDE screen

Submit a Template Claim

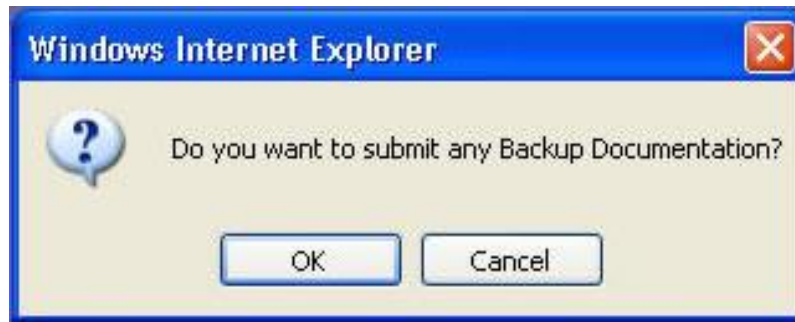
- At the DDE screen finish filling in the template

The screenshot shows a web form for submitting a claim. At the top, there are buttons: Close, Save Claim, Submit Claim, and Reset. Below these is the 'Institutional Claim' section with a note about asterisks denoting required fields and a link to 'Billing Instructions'. The form is divided into two tabs: 'Basic Claim Info' (selected) and 'Other Claim Info'. Under 'Basic Claim Info', there are sub-tabs: 'Billing Provider', 'Subscriber', 'Claim', and 'Service'. The 'Submitter ID' field is populated with '2857403'. The 'PROVIDER INFORMATION' section includes a note to go to 'Other Claim Info' for other providers. The 'BILLING PROVIDER' section has fields for 'Provider NPI' (5522336671) and 'Taxonomy Code' (282N00000X). A question 'Is the Billing Provider also the Pay-To Provider?' is answered 'Yes'. The 'SUBSCRIBER/CLIENT INFORMATION' section has a 'SUBSCRIBER/CLIENT' sub-section with fields for 'Client ID' (999999999WA), 'Org/Last Name' (Smith), 'Date of Birth' (11/15/1986), and 'Gender' (M-Male). There is also an unchecked checkbox for 'Additional Subscriber/Client Information'. 'Top' links are present at the end of the 'PROVIDER INFORMATION' and 'SUBSCRIBER/CLIENT INFORMATION' sections.

- Once completed save the claim or submit the claim

Submit a Template Claim

- Click on the  button and submit your claim
- ProviderOne should display this BU prompt (turn off your pop up blocker!)
 - Click “Cancel” as you don’t need BU with this claim



- ProviderOne displays the Submitted Institutional Claim Details screen

Submit a Template Claim

- The Submitted Institutional Claim Details screen
 - This screen shows the TCN number and claim data

Submitted Institutional Claim Details


TCN: 200925500000001000
Provider NPI: 5522336671
Client ID: 999999999WA
Date of Service: 9/9/2009 0:0:0-9/112009 0:0:0
Total Claim Charge: 2514.69

Please click "Add Attachment" button, to attach the documents.

Attachment List:

<input type="checkbox"/>	Line No ▲ ▼	File Name ▲ ▼	Attachment Type ▲ ▼	Transmission Code □ ▼	Attachment Control ▲ ▼	File Size ▲ ▼	Delete ▲ ▼	Uploaded On ▲ ▼
No Records Found !								

WARNING: You must click the OK button to complete the claims submission.



- Click on the “OK” button to finish submitting the claim!

Reference Guides

- ■ For general reference see the [ProviderOne Billing and Resource Guide](#)
- ■ See provider training tools on the [ProviderOne resources page](#)
- ■ See the complete list of [Type of Bill codes](#)
- ■ See the [Nursing Home billing guide](#)